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Foreign Crops and MARKETS



VOLUME 49



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CANADIAN PRODUCTION OF ALFALFA, CLOVER, AND GRASS SEEDS

The weather during the harvest season just coming to an end in Canada has been unusually favorable for hay and grass seed. Frost damage has been light on the late-maturing seed crops, and the dry weather during harvest resulted in lower dockage losses than usual. There was little or no snowfall to hinder harvesting and threshing operations. Larger acreages harvested for seed are reported by the Dominion Department of Agriculture for alfalfa, sweet clover, brome grass, Canada blue grass and for creeping red fescue. The acreages of alsike and red clover, due to the drought in Eastern Canada, were nearly 50 percent smaller than in 1943. Of the three seed crops (alfalfa, alsike, and red clover) being stimulated through the participation-certificate program, alfalfa is the only one with a substantial exportable surplus. The drought in eastern Canada, the main producing area, curtailed production of alsike and red-clover seed drastically.

CANADA: Production of alfalfa, clover, and grass seeds, 1944 with comparisons
(Clean-seed basis)

KIND	AVERAGE : 1937-1941 :	1940 :	1941 :	1942 :	1943 :	1944 a/ :
	1,000 : pounds :	1,000 : pounds :	1,000 : pounds :	1,000 : pounds :	1,000 : pounds :	1,000 : pounds :
Alfalfa	5,297 :	3,980 :	8,803 :	4,800 :	4,486 :	7,775
Alsike clover	3,216 :	1,140 :	5,194 :	913 :	4,760 :	1,400
Red clover	3,794 :	2,258 :	6,210 :	1,598 :	7,297 :	6,917
Sweet clover	7,184 :	4,959 :	2,718 :	5,959 :	6,812 :	11,363
Timothy	4,935 :	4,222 :	4,813 :	13,713 :	14,897 :	11,154
Crested wheat grass	1,829 :	2,013 :	2,285 :	2,600 :	2,494 :	2,365
Slender wheat grass	53 :	35 :	64 :	116 :	174 :	315
Brome grass	4,183 :	5,752 :	7,478 :	10,086 :	10,439 :	10,590
Bent grass	13 :	13 :	11 :	5 :	4 :	6
Canada blue grass	183 :	336 :	100 :	420 :	340 :	175
Kentucky blue grass	b/ :	b/ :	b/ :	130 :	61 :	25
Creeping red fescue	40 :	59 :	102 :	227 :	236 :	306

Plant Products Division, Department of Agriculture, Ottawa, Ontario, Canada.

a/ Preliminary. b/ Data not available.

Based on the November report, the Department of Agriculture estimates indicate the largest crop of alfalfa seed since 1941 and the second largest of record. Nearly 90,000 acres were harvested for seed in 1944 compared with 68,000 in 1943. The yield of 87 pounds per acre is considered only fair, but is substantially above the 66 pounds harvested in 1943. In spite of the larger alfalfa-seed crop in Ontario, it is expected that considerable seed will be moved east from western Canada to meet the requirements of that area. There was some frost damage to the alfalfa seed crop in western Canada but as a whole the seed is of good quality, particularly in Manitoba where the largest crop in the history of the Province was harvested.

The estimated 1,400,000 pounds of alsike harvested in 1944, is less than a third as large as the 1943 crop of 4,760,000 pounds, and less than half of the 1937-1941 average of 3,216,000 pounds. The drought in eastern Canada caused many farmers to cut their alsike for hay or to pasture the fields. The yields on the harvested acreage were more than a third lower than the 120 pounds per acre reported in 1943. The harvest of alsike clover mentioned above is less than domestic needs, and practically none will be available for export.

The Canadian red-clover-seed crop turned out somewhat better than was anticipated a month ago. The crop is now estimated at 6,917,000 pounds, which is only 5 percent less than the 1943 crop, and is the second

largest crop on record. The harvested acreage, of 59,720 acres, is 40 percent smaller than the 100,200 acres harvested in 1943. The smaller acreage and the severe drought in Ontario and Quebec were offset to a large extent by substantially higher per-acre yields, 116 pounds per acre in 1944 compared with 73 pounds in 1943. The carry-over of 875,000 pounds of red-clover seed, from 1943, together with the 1944 crop will provide a supply only slightly more than is needed for Canadian domestic needs.

The 1944 crop of sweet clover seed, 11,363,000 pounds, is materially above the below-average crop of 1943 (6,812,000 pounds) and is only slightly smaller than the record sized crop of 1938. Unusually favorable yields on a slightly larger acreage than in 1943 contributed to the abundant harvest in both Ontario and in western Canada. This large crop of sweet-clover seed will insure a large exportable surplus, for which the United States is the principal market.

With the exception of the blue grasses, Canada and Kentucky, Canadian grass-seed production in 1944 is on a high level. Al-

though the timothy crop was 25 percent smaller than in 1943, it was the fourth largest crop on record. Crested-wheat-grass production, slightly smaller than the record-sized crops of 1942 and 1943 was 30 percent larger than the 1937-1941 average. The crops of brome, slender wheat, and creeping red fescue are of record size, according to this latest report.

The acreages of Canada and Kentucky blue grasses were as large as in 1943, but the very low yields due to drought produced the smallest crops in several years.

Although the timothy-seed crop is smaller than last year, the large carry-over insures ample supplies for planting and a small exportable surplus. Supplies of brome, slender wheat, crested wheat, and creeping red fescue are ample, with substantial exportable surpluses. The small crop of Canadian blue-grass seed does not provide the normal export to the United States. The Kentucky blue-grass-seed crop is far below Canadian needs, and imports will be required if there is the usual demand for this seed.

*From November Crop Report,
Department of Agriculture, Ottawa*

SPANISH PRODUCTION OF PICKLED OLIVES LOWER

The preliminary forecast of pickled-olive production in Spain for the 1944-45 season is 26,400 short tons, of which 9,600 tons are expected to be Queens and the remainder Manzanillas. The forecast is 55 percent smaller for Queens than the 21,100 tons produced last year, and 42 percent larger than the estimated production of 11,800 tons of Manzanillas for 1943-44. Practically the entire production of Queens and about 14,000 tons of the Manzanillas are expected to be of suitable quality for export to the United States.

SPAIN: Production of pickled olives, 1944-45 with comparisons

YEAR	: QUEENS:	: MANZANILLAS:	: TOTAL
	: Short	: Short	: Short
Average -	: tons	: tons	: tons
1938-39 to 1942-43:	13,900:	12,300:	26,200
1933-34 to 1942-43:	15,200:	14,100:	29,300
1940-41	5,800:	11,300:	17,100
1941-42	38,400:	25,900:	64,300
1942-43	2,800:	5,600:	8,400
1943-44 a/	21,100:	11,800:	32,900
1944-45 b/	9,600:	16,800:	26,400

Compiled from official sources.

a/ Preliminary estimate.

b/ Preliminary forecast.

While growing conditions in general were satisfactory, the unusually cool weather in early summer in some sections caused a lighter set of fruit than that of the previous year. According to some observers, growers did a little more pruning and fertilizing in their olive groves during the past season. The results of this increased attention probably will be reflected in the 1945-46 harvest. The quality of this year's fruit is reported good.

Stocks remaining from the 1943-44 production suitable for export to the United States are said to be the smallest in several years. Sold and awaiting shipment to the

United States on October 1 were 2,208 short tons of Queens and 3,360 tons of Manzanillas. There are no unsold Queens and only 960 tons of Manzanillas from the previous year's production. The apparent available pickled-olive supply for export to the United States therefore are 9,600 tons of Queens and about 14,960 tons of Manzanillas.

The latest figures available for publication on annual declared exports of pickled olives at Seville for shipment to the United States are as follows:

Year	Queens	Manzanillas	Total
Average -	Gallons	Gallons	Gallons
1937-1941	3,350,592	2,248,035	5,598,627
1932-1941	3,587,560	2,104,983	5,692,543
Annual -			
1939	3,378,454	2,095,955	5,474,409
1940	4,471,090	2,564,769	7,035,859
1941	3,504,708	1,967,572	5,472,280

The declared exports shown above were divided as to "pitted or stuffed" or "unpitted" as follows:

Year	Pitted or Stuffed	Unpitted	Total
Average -	Gallons	Gallons	Gallons
1937-1941	3,201,736	2,396,891	5,598,627
1932-1941	2,984,522	2,708,021	5,692,543
Annual -			
1939	3,014,741	2,459,668	5,474,409
1940	3,896,406	3,139,453	7,035,859
1941	3,224,696	2,247,584	5,472,280

An order of the Ministry of Agriculture dated September 13, 1944, provides that growers and picklers of green olives for table use may pickle Queen olives and fine, medium, and ordinary qualities of Manzanillas. In the Province of Seville, "Moron," "Rapazalla," and "Objiblanca" olives may

also be pickled, while in other Provinces all varieties of olives may be pickled.

The same order also fixes the following grades and prices for sound-quality fruit. Queen olives, not smaller than 130 olives per kilogram (2.2 pounds), a minimum of \$6.39 per 110 pounds; Manzanillas, not smaller than 320 olives per 2.2 pounds, \$9.13 per 110 pounds. These prices represent an increase over last season of \$1.83 per 110 pounds for Queens and \$2.28 for Manzanillas. The above prices relate to olives delivered to buyer's warehouses. These prices were published after harvesting had been under way a short time, and some business had already been done at somewhat higher levels. There are no restrictions on prices for other types of olives authorized for pickling under this order.

The Ministry of Agriculture on the recommendation of the "Sindicato Provincial del Olivo," will establish minimum export prices at the conclusion of the Queen-olive pickling season. In Seville, trade sources indicate that a somewhat higher export price will be fixed in view of the higher prices paid producers, largely due to the smaller production.

In this same connection, if the export market warrants such action, the Ministry of Agriculture, as in former years, may collect from exporters and buyers 91 cents per 110 pounds exported for the purpose of creating a fund in favor of the growers. A fee of 1 peseta (9.13 cents) for every 110 pounds of olives pickled (all varieties) will be collected from picklers by the "Sindicato Vertical del Olivo." This is somewhat different from that of last year, when a fee of 9.13 cents was collected for Queens and Manzanillas and 4.57 cents for all other types.

W. R. Schreiber

SPANISH ALMOND CROP POOREST ON RECORD

The 1944 preliminary estimate of Spanish almond production is 12,100 short tons, shelled basis, as compared with 30,800 tons in 1943 and 27,500 tons in 1942. The estimate is 50 percent smaller than the 5-year average (1938-1942) and 51 percent smaller than the 10-year average (1937-1942). Growing conditions were extremely unsatisfactory in most areas. In February and March the Reus-Tarragona area experienced exceptionally cold weather when subzero temperatures and heavy snowfalls were recorded. The damage in some sections of this area from frost is estimated as high as 50 percent. The Valencia and other areas also experienced severe

frost. The worst damage was reported to have been in the higher sections. Coastal areas seem to have come through the winter in somewhat better condition, and a few scattered sections report near-normal yields. The damaging effect of the frosts was further aggravated by a severe drought during the summer, the combined effect being the smallest crop of almonds on record.

**SPAIN: Estimated production of almonds,
1944 with comparisons (shelled basis)**

YEAR	PRODUCTION
	Short tons
Average -	
1938-1942	24,100
1933-1942	24,600
1942	27,500
1943	30,800
1944a/	12,100

a/ Preliminary estimate.

The quality of the new almond crop is reported good. In Malaga, large-sized Jordans, and Valencias, such as 19/20, 16/17, and 14/15, are scarce. Early in the year growers in that area thought large sizes would be plentiful. These hopes did not materialize, however, because of adverse weather conditions as the season progressed. The harvesting of the small crop started in August and proceeded normally. No unusual difficulties in the operations were reported. The marketing outlook is somewhat confused due to the possibility of restrictive export measures, war dislocation of normal markets, uncertainty of shipping space, inflated prices, and the large stocks of almonds carried over from previous years.

The Spanish Government on July 10, 1943, removed the embargo on exportation of almonds that had been in effect since 1940. The removal of the embargo was intended to assist in moving the extremely heavy carry-over, estimated at 33,000 short tons (shelled) on July 1, 1943, to which 30,800 tons of the 1943 crop must be added.

Negotiations with Argentina and other Latin American countries were carried on during the 1943-44 season for the purpose of exporting some of this large supply. Exports were made to the United States, Sweden, Switzerland, Canada, Argentina, Brazil, and a few to Germany. Actual export statistics covering the period July 1943

to August 1944 are not available. Trade estimates indicate, however, that some 10,000 tons were exported.

Domestic consumption, which before the civil war rarely exceeded 15 percent of the crop, had risen to 35 percent, because of the Government's policy to keep almonds from being exported and domestic prices low. The food-supply situation in Spain has been bad since the civil war, and almonds have been ground into flour and made into oil.

At the time new-crop almonds started coming to market this season it was estimated that old-crop carry-over stocks amounted to 1,700 tons shelled and 15,000 tons unshelled. The bulk of this unshelled tonnage is still in the hands of growers and speculators. Exporters reported that both old- and new-crop nuts were being marketed very slowly by growers, who feel that prices should be higher. The domestic market at Malaga in October was reported at practically a standstill, while at Valencia buying was active at rising prices. The exportable surplus, new crop and carry-over, is estimated at 8,800 short tons, shelled basis.

The removal of trading restrictions in 1943 did not remove the necessity for export licenses issued by the Ministry of Industry and Commerce. The Ministry collects 5 percent of net f.o.b. value on shipments to the United States and 7 percent to other countries. These licenses are frequently rather slow in coming through to exporters who have found it desirable to make quotations subject to granting of export licenses by Madrid authorities. The Ministry of Industry and Commerce has published the following minimum prices for shelled almonds, f.o.b. Spanish port: Comuna, Mallorca, Propietario, Valencia (inferior classes), and second-class Esperanza, 8.75 pesetas per kilogram (35.9 cents per pound); Valencia (superior class), first-class Esperanza, Planeta, Pestaneta, Jordana (inferior classes), 10.00 pesetas (41.5 cents); and Marcona, Largueta, and

Jordana (superior classes), 10.75 pesetas (44.6 cents per pound). If prices up to 2 pesetas (13.3 cents per pound) more than those listed are received, one-half of the excess must be returned to the Syndicate. If prices of more than 2 pesetas above those listed are received, two-thirds must be returned.

The exporters in some exporting centers in midsummer expressed doubt as to whether much American and Canadian business would be done this season. These doubts were based on the possibility of an early end to the war, lack of interest on the part of

Canadian and American buyers, and high prices. The ceiling prices on shelled almonds in the United States acted as a brake on importation of high-priced Spanish almonds.

There were inquiries from other countries for limited lots, but, due to shipping difficulties, much of this potential export business had to be dropped. It is now reported that American importers have contracted for almonds for December, January, and February shipment at prices ranging from \$118.00 to \$123.00 per quintal (220 pounds net), c.& f. Philadelphia, depending on grade and size.

W. R. Schreiber

LATE COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDS

CANADIAN WHEAT REQUIREMENTS REDUCED

Canada's domestic wheat requirements for the crop year ended July 31, 1945, are now estimated at about 160 million bushels, which is 20 million bushels less than the revised estimate of requirements for the preceding year. The decrease is attributed to an expected reduction in wheat feeding, especially to hogs. The probable requirements are distributed as follows: Food 50, seed 30, feed 73, and industrial use 7 million bushels. According to reports, little change from the 1943 utilization is indicated except in the use for feed.

With the reduction in estimated domestic needs, the surplus available for export during the remainder of the season or for carry-over next August 1, was placed at 563 million bushels, as of November 1. That estimate indicates a reduction of 68 million bushels compared with the position a year earlier, despite the much larger crop in 1944.

UNION OF SOUTH AFRICA'S WHEAT CROP REDUCED; OATS AND BARLEY INCREASED

The first estimate of the production of small grains in the Union of South Africa

shows a smaller wheat crop but larger out-turns of coarse grains than in 1943. The wheat crop harvested in November-December is estimated to be about 15.3 million bushels, compared with the revised 1943 estimate of 18.0 million bushels and the average of 16.6 during the past 5 years. The reduction is attributed largely to unsatisfactory weather conditions and to insect damage, especially in the Orange Free State. Some decrease in acreage was also a factor, however, as the 1944 area was reported at 2,338,000 acres as compared with the 1943 area of 2,701,000 acres.

Feed-grain areas, in contrast with wheat districts, benefitted from improved weather conditions. In the Karroo district and the western Province of the Cape of Good Hope, where a large part of the feed grains are grown, weather conditions were reported to be much improved over those of a year ago. The production of oats is estimated to be about 10.4 million bushels compared with 7.6 million bushels in 1943. The barley crop is placed at 3.2 million bushels or almost 60 percent larger than the production last year. No estimate of the 1944 acreage of feed grains is available.

MADAGASCAR HAS SMALL MANIOC CROP

The 1944 production of manioc in Madagascar was estimated at 992,000 short tons.

At that figure the outturn would be the smallest reported for some years, and compares with 1,323,000 short tons in 1943 and an average of 1,596,000 tons for the 5 years ended with 1942. The decline in production was largely due to adverse weather conditions. The area was reported at 618,000 acres, compared with 494,000 acres in 1943.

BRITISH GUIANA EXPERIMENTS WITH MODERN RICE-CULTIVATION METHODS

An experiment in the mechanization of rice cultivation is being carried out on about 12,000 acres of land between the Mahaicony and Abari Rivers in northern British Guiana. The project, based on efficient drainage and irrigation, large-scale mechanical cultivation, and modern centralized milling, has been under way for several months under the supervision of the Rice Expansion Committee. The results of the plan may affect future rice production in British Guiana, as it is expected to determine the advantages of mechanization over the present type of cultivation.

About 2,700 acres of the scheme are now under cultivation, and the remainder is scheduled for completion in 2 years. Some imported machinery, which has been used in this area, such as threshing machines and ploughs, has proved satisfactory. It is reported that, at the present time, the project employs about 500 individual owners and tenants. The experiment is expected to increase annual production by around 700,000 bushels (20 million pounds milled).

Rice production in British Guiana is now estimated at 3,800,000 bushels (110 million pounds), which represents a 15-percent gain over production during the pre-war years, 1935-1939, when it averaged 3,340,000 bushels (98 million pounds). Consumption amounts to about 55 million pounds annually, and the remainder of the crop is exported primarily to the British West Indies. As almost one-third of British Guiana's population are East Indians, practically all rice before the war was consumed and exported in the form of parboiled rice, processed according to East Indian methods.

VEGETABLE OILS AND OILSEEDS

CEYLON COPRA PRODUCTION ESTIMATE REVISED DOWNWARD

A revised estimate places the 1944 production of copra in Ceylon at about 230,000 short tons, which constitutes a reduction from an earlier estimate this year of 245,000 tons. This new estimated output is considerably lower than the 1943 production of 300,000 tons. Domestic production of coconut oil is expected to show a decrease from last year's output of 95,000 tons, a large percentage of which was exported.

A number of reasons have been advanced to explain the lower production of these two commodities. The failure of the industry to plant sufficient acreage to replace old groves beyond bearing age, the reduced use of fertilizer, and labor shortages for harvesting and drying the copra, have been among the principal factors responsible for the lower production. The use of larger quantities of fresh coconuts for edible purposes has limited the number of nuts for drying. Shortage of basic staples, particularly rice, and prevailing high prices in these commodities have caused a sharp increase in consumption of fresh fruit as a substitute foodstuff. It is now estimated that 50 percent of the total coconut production is being consumed locally as food. This represents an increase of more than 10 percent compared with the rate of consumption of 1943. Also, exports of fresh coconuts in 1944, mostly to India, are exceeding the record volume of 1943.

Although exports of coconut oil during July-September were seasonally high, the total movement for the first 9 months of 1944 was lower than that for the corresponding period of 1943. This decrease is attributed largely to the lack of replacement parts for the expelling equipment. Copra exports to all destinations for 1944 will amount to only about two-thirds of the total shipment of last year. The export of desiccated coconuts increased during the third quarter. The total foreign movement of this commodity for 1944, however, will amount to only about 15 percent of pre-war levels.

COTTON AND OTHER FIBERS

COTTON STOCKS AT PERUVIAN PORTS EXCEED 1944 CROP

Largely because of declining exports, stocks of cotton at Peruvian ports have increased steadily from 292,000 bales (of 478 pounds) at the end of August 1944 to about 355,000 on November 9. The latter figure is somewhat larger than the entire 1944 crop, estimated at 286,000 bales. Exports during the first 9 months of 1944 amounted to only 85,000 bales compared with 112,000 and 113,000 for similar periods in 1943 and 1942, respectively.

Deducting domestic consumption of approximately 41,000 bales for the 9-month period and exports of 85,000 bales from the estimated 1944 crop, it appears that stocks on hand at the end of September were 160,000 bales higher than the carry-over at the end of 1943, which was estimated at 201,000 bales. Since the bulk of the Peruvian crop is picked during May-September, stocks are not likely to rise further in the current season.

The United Kingdom and Chile accounted for 28,000 and 23,000 bales, respectively, of the total exports during January-September 1944. Exports to Cuba, Colombia, Spain, Venezuela, and the United States, in order of importance, ranged from 6,000 down to 4,500 bales. Nearly all of the remainder was exported to other Latin American countries. Sales of 1944 cotton registered with the Cotton Chamber during the 9 months under review were reported at 191,000 bales and represented about 67 percent of the 1944 crop.

Prices were slightly depressed during September by the slow movement of exports and increase in stocks. Prices of 1944 Tanguis cotton averaged 105.07 soles per Spanish quintal of 101.4 pounds (15.94 cents per pound) for all grades, in September as compared with 106.77 soles (16.20 cents) for August. Corresponding averages for 1944 Pima cotton were 145.55 soles (22.08 cents) and 143.33 soles (21.74 cents). The weekly cabled reports indicate that spot prices for Tanguis, Type 5, remained around

102 soles (15.47 cents) from October 26 to December 2.

HAITI'S COTTON SURPLUS EXPORTED TO COLOMBIA

Exports of cotton from Haiti during the fiscal year ended September 30, 1944, amounted to 20,635 bales (of 478 pounds net) compared with 8,827 bales in 1942-43 and 10,095 in 1941-42. Nearly all of it was destined for Colombia as in the 2 previous years. Increased exports were attributed in part to high prices that encouraged greater efforts on the part of peasants to pick all available quantities of cotton growing wild as well as their cultivated crops. A relatively large carry-over from the previous season also was exported in 1943-44.

A contract signed on July 26, 1944, by a representative of the Haitian Government provides two local residents with the exclusive right to construct a spinning and weaving mill with an annual production capacity of 3 to 9 million square yards of coarse cloth. Consumption requirements are estimated at around 25 million square yards annually, and there are no cotton mills operating in Haiti at present. The existence of a local mill industry may encourage some cotton acreage expansion in post-war years, but natural factors, including insect pests, topography, and economic conditions are not favorable and may limit such possible increases.

FRUITS, VEGETABLES, AND NUTS

1945 CUBAN GRAPEFRUIT CROP UNCERTAIN

Prospects for the 1945 Cuban grapefruit crop are uncertain. While the trees have put out new leaves and show some bloom since the hurricane, the density of the bloom and the vigor of the trees are largely determined by the quantity of fertilizer applied at this season of the year. The general shortage of fertilizer and the slow rate of its distribution to growers is preventing adequate fertilization. This probably will curtail the size of the 1945 crop.

The 1944 grapefruit season, now ended, on the Isle of Pines shows an average "on tree" return to growers of \$1.04 per crate for the fruit exported. Normally, estimates of costs of production vary between 80 and 90 cents per crate when a full crop is harvested, but this year the October hurricane caused considerable damage, and this means a higher per crate production cost.

PALESTINE'S CITRUS OUTLOOK HOPEFUL

The citrus acreage in Palestine has been reduced about 20 percent since the beginning of the war. The remaining groves are mostly in a low state of productivity, and it will probably take about 5 years to restore them to their pre-war average yield. Apparently, the Jaffa orange groves are in better condition than others and perhaps will take only 2 years to recover.

It is predicted that the post-war total exportable citrus crop may reach 18 million cases, since the reduction in area may be more than offset by the increased productivity of the young groves yet to reach full bearing age. Further, it is predicted that the seasonal marketing period will be lengthened as a result of a reduction in the grapefruit output and an increase in the production of late-maturing oranges. The grapefruit acreage has been reduced nearly 50 percent during the war. The area in Valencia oranges has been expanded considerably and may yield 1.5 million cases.

The unfavorable marketing season of 1938-39, which contributed greatly to the abandonment of groves and to pessimism as to the future of the citrus industry in Palestine, was largely due to the lack of market outlets. England took nearly all of the 15 million cases exported in that banner year of production, but, because of low prices, a heavy financial loss was suffered by producers. If Europe and the Soviet Union again become available as outlets for Palestinian fruit, the longer marketing season, together with increasing interest in the nutritional value of citrus fruits, will tend to improve the prospect for the industry.

MEXICAN TOMATOES TO ENTER CANADA AT UNITED STATES TRADE-AGREEMENT RATE

Fresh tomatoes from Mexico will be admitted into Canada at the rate of duty that applies to tomatoes imported from the United States, according to an Order in Council dated November 7. This rate is 10 percent ad valorem but not less than 1.5 cents per pound and applies to imports during the period December 1, 1944, to May 15, 1945.

SUGAR

PERUVIAN SUGAR PRODUCTION INCREASED IN OCTOBER

The October production of sugar in Peru was estimated at 50,000 short tons, which brings the total 1944 production through October to 331,000 tons. For the year, production is expected to total 440,000 tons, compared with 410,000 tons in 1943. The September exports amounted to 22,000 tons. Exports for 9 months totaled 243,000 tons, compared with 144,000 tons for the corresponding period in 1943 and 235,000 tons in the January-September period of 1942.

Domestic consumption continues at a relatively high level. In September it was estimated that 10,400 short tons were consumed, and the total for the first 9 months of 1944 is placed at 104,000 tons. The comparable figures for 1943 are 7,600 and 99,000 tons, respectively.

Apparent stocks as of November 1 are indicated to be about 44,000 short tons. It is reported that these stocks have already been contracted for or sold for export to Chile, Uruguay, Argentina, Mexico, and other countries.

LIVESTOCK AND ANIMAL PRODUCTS

ARGENTINE HOG MARKETINGS REACH NEW HIGH LEVEL

The output of hog products in Argentina has reached a new high level this year, and exports of pork and lard have been unusually large so far. Hog marketings for the year are expected to reach 3,800,000 head, an

increase of 27 percent above 1943. The exportable surplus of frozen pork this year is expected to be close to 397 million pounds, carcass weight, an increase of 73 percent above actual exports in 1943, while the exportable surplus of lard is estimated at 88 million pounds, which is an increase of 19 percent above actual exports in 1943, but below the earlier estimate for this year. In June, July, and August, prices of lard reached a low level, and at that time some lard was diverted to soap making for domestic use.

Hog marketings for the first 10 months of 1944 reached 3,199,200, an increase of 27 percent above the same period of 1943 and about four times as large as in that period of 1939. Those for the months of July and August combined were practically as large as total marketings in 1939.

It is expected that the current high level of marketings will continue, at least during the first 6 months of 1945, but fall off somewhat in the last half of the year. Slaughter in 1945, therefore, will be similar to that of 1944 with a tendency to show an increase rather than a decrease.

Corn supplies are large but in some districts out of the corn zone prices were considered too high in relation to the price of hogs. Protests by feeders brought about a concession by the Government whereby corn for feeding can now be bought at the same price as corn used for fuel.

Exports of frozen and cured pork for the first 9 months of this year totaled 220 million pounds, actual shipped weight, compared with 152 million pounds in the same period of 1943, and 93 million pounds in the first three quarters of 1942. The bulk of the exports consists of frozen pork, but there is a tendency to export more pork cuts and less boneless pork, which tendency is expected to be accentuated in 1945.

Lard exports through November 20 had reached a total of 55 million pounds, which leaves about 33 million pounds of the exportable surplus still to be shipped.

Exports of lard for the first 9 months of 1944 totaled 49 million pounds, with the principal destinations and percentage of total given in parentheses as follows: Mexico

(25); Peru (21); Switzerland (19); Sweden (8); Ecuador (8); and Brazil (5). The United Kingdom took very little during this period but had negotiated for shipments in October, November, and December. The price offered by the British Ministry of Food, however, was below packers' offers, and they were reported as not ready to accept the lower prices. They contend that the price of lard should be at least equivalent to that of tallow and in the event of nondisposal of lard at the price quoted, or £52 (\$210.00) c. & f. per long ton, they must of necessity go back to the supplying of boneless pork rather than supplying a substantial part of the pork exports in the form of pork cuts.

URUGUAY CONTINUES TO ENCOURAGE HOG PRODUCTION

Hog breeding is being fostered by the Uruguayan Government, as it is considered desirable to encourage the breeding of hogs in order to increase the domestic stock of pigs so that more profit may be derived from the country's corn crop by converting it into meat and fat.

In July 1944 a decree was issued by the Government prohibiting the slaughtering of all suckling pigs. On October 31, the slaughter of male suckling pigs was authorized, but the prohibition against the slaughter of female suckling pigs still remains in effect.

No slaughter of hogs for export has taken place for many months, and imports of live hogs and of pork from Argentina have been necessary to meet domestic demands. Uruguay's exports of pork have never exceeded 3 million pounds annually, practically all going to the United Kingdom in the form of frozen pork.

Uruguay had approximately 350,000 hogs in 1942, and numbers decreased in 1943 as a result of the 1942-43 drought. In numbers of hogs Uruguay ranked fifth among the South American countries in 1942, with Brazil first followed by Argentina, Colombia, and Chile. On the basis of the number of hogs per 1,000 inhabitants, however, Uruguay ranks fourth preceded by Brazil, Argentina, and Colombia. Before the German occupation in 1940, Denmark

had more hogs per 1,000 inhabitants than any other country, or 855.

Slaughter in Uruguay in the first 10 months of 1944 totaled 77,300, a decrease of 4 percent below the same period of 1943. In the year 1943, approximately 100,000 were slaughtered in freezing companies and abattoirs, which was a little above 1942 but 19 percent below 1941. These slaughter figures appear very small in relation to the total number of hogs in Uruguay, so it is assumed that reported slaughter represents a relatively small proportion of the total number killed.

DANISH FALL MARKETINGS OF LIVESTOCK HEAVY

With prospects of poor grazing conditions and a short fodder supply in Denmark during the approaching winter, marketings of hogs and cattle have been larger than a year ago. The heavier cattle marketings so far this year are due to larger cattle numbers together with a tight feed situation.

Deliveries of cattle to slaughter houses during September increased to such an extent that it became necessary to regulate them beginning September 23. This was partly because of the difficult transportation situation. The scarcity of feed has resulted in increasing numbers of cattle and calves being registered for delivery each week. During the second week in November, deliveries had to be further restricted. Average weekly receipts of cattle amounted to between 15,000 and 16,000 head through the first week in November and thereafter were reduced to around 14,000 weekly.

Production of beef and veal in September 1944 increased 40 percent as compared with September 1943. The total for the first 9 months of this year amounted to 185 million pounds, compared with 151 million pounds a year earlier. Prices of cows and heifers in calf have dropped considerably compared with the same time in 1943.

Cattle numbers in July 1944 were reported at 3,170,000 head, which was an increase of 5 percent above 1943 but about 3 percent below the summer estimate for 1939, when numbers were at record levels.

The number of hogs reported on hand at the beginning of the hog-marketing year on October 7 this year was 2,148,000, or 10 percent below the October numbers a year ago. The number of sows had declined 25 percent to 195,000, whereas the number of slaughter hogs of all weights on hand showed a reduction of 5 percent to 1,496,000 head. The trend in hog numbers was upward from the wartime low of 1,141,000 to which they fell in June 1942, to 2,396,000 reported in October 1943. Since then numbers have fallen off somewhat, as a result of the heavy slaughter in the last 3 months of 1943, and in the first 6 months of this year.

During the first 6 months of 1944 the number of hogs slaughtered was unusually large and reached 1,307,000 head, an increase of 81 percent above the same period of 1943. Slaughterings in the first 6 months of this year were as large as in the entire year 1942.

Pork production in the first 9 months of 1944 totaled 293 million pounds, an increase of 25 percent above the same period of 1943. Since May, however, production has been smaller each month than a year earlier.

DENMARK: October estimate of hog numbers, 1944, with comparisons

CLASSIFICATION	OCTOBER			
	1939:	1942:	1943:	1944
	Thou- sands	Thou- sands	Thou- sands	Thou- sands
Boars	18:	a/	11:	10
Sows, total	372:	a/	259:	195
Bred	251:	55:	160:	116
Suckling pigs	696:	a/	549:	417
Slaughter hogs- :	:	:	:	:
Over 132 pounds :	573:	a/	525:	645
77 to 132 pounds:	766:	a/	421:	440
Under 77 pounds :	767:	a/	531:	411
Total slaughter:	:	:	:	:
hogs	2,106:	:	1,567:	1,496
	:	:	:	:
Total	3,192:	1,593:	2,396:	b/ 2,148
	:	:	:	:

Compiled from official sources.

a/ Not available.

b/ As reported. The individual items add to 2,118,000.

DAIRY SITUATION IN THE UNION OF SOUTH AFRICA

Butter production in the Union of South Africa has declined sharply in recent months. The September output of 1,545,000 pounds, the latest figure available, was the smallest for any month in several years. Following the recent widespread rains, however, an improvement in the situation is expected. Production for the first 9 months of 1944 amounted to 28,272,000 pounds, which was 2,025,000 pounds below that for the corresponding period of 1943. Butter stocks in the Union are being reduced rapidly. The total quantity on hand at the end of September 1944 was only 962,000 pounds, compared with 1,864,000 pounds a year earlier.

Cheese production has also shown a downward trend. The Union manufactures

Cheddar and Gouda, together with smaller but fair quantities of other types. Their production in the first 6 months of 1944 was 7,356,000 pounds, compared with 8,023,000 pounds for a similar period in 1943. Cheese stocks at the end of September amounted to 1,864,000 pounds, or 85,000 pounds below those on hand at the end of September 1943.

UNION OF SOUTH AFRICA: Production of butter and cheese during specified periods

ITEM	AVERAGE : : 1937-1941:	1942 : : 1,000 : : pounds :	1943 : : 1,000 : : pounds :	1944 : : 1,000 : : pounds :
Butter :	35,517 :	44,699 :	44,923:a/	28,272
Cheese :	13,631 :	18,451 :	17,062:b/	7,356

Official sources.

a/ First 9 months only.

b/ First 6 months only.

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OFFICE OF FOREIGN AGRICULTURAL RELATIONS
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